

REACT Survey – June 2022



SURVEY METHODOLOGY

Findings in this report are from a monthly survey conducted by Angus Reid on behalf of Restaurants Canada with a nationally representative sample of 1,500 Canadians who are members of the online Angus Reid Forum. For comparison purposes only, a sample of this size would result in a margin of error of +/- 2.6 percentage points, 19 times out of 20.

REACT Survey

- Restaurant Expectations And Consumer Trends -

HIGHLIGHTS

A Greater Share of Canadians Dining Out at Least Once in June

- Despite a steep drop in consumer confidence, the share of Canadians who ordered from a restaurant *at least once* in June rose across all dayparts compared to May. After sitting on the sidelines in previous months, a larger share of 35 to 54 year olds, and those 55 and older, ordered from a restaurant *at least once* in June. While a greater share of Canadians purchased a meal or snack at least once in June, the share of those that ordered lunch or dinner from a restaurant *more than once a week* held steady.

Economic Headwinds Could Slow Restaurant Traffic

- Greater inflation, rising interest rates and growing concern about a possible recession in the future could lead to a moderation in foodservice spending. Just over one in four Canadians said they will *go out less often* to a restaurant in July. By comparison, 12% of respondents said they will *go out more often* to a quick-service restaurant and 18% that said they will *go out more often* to a table-service restaurant.

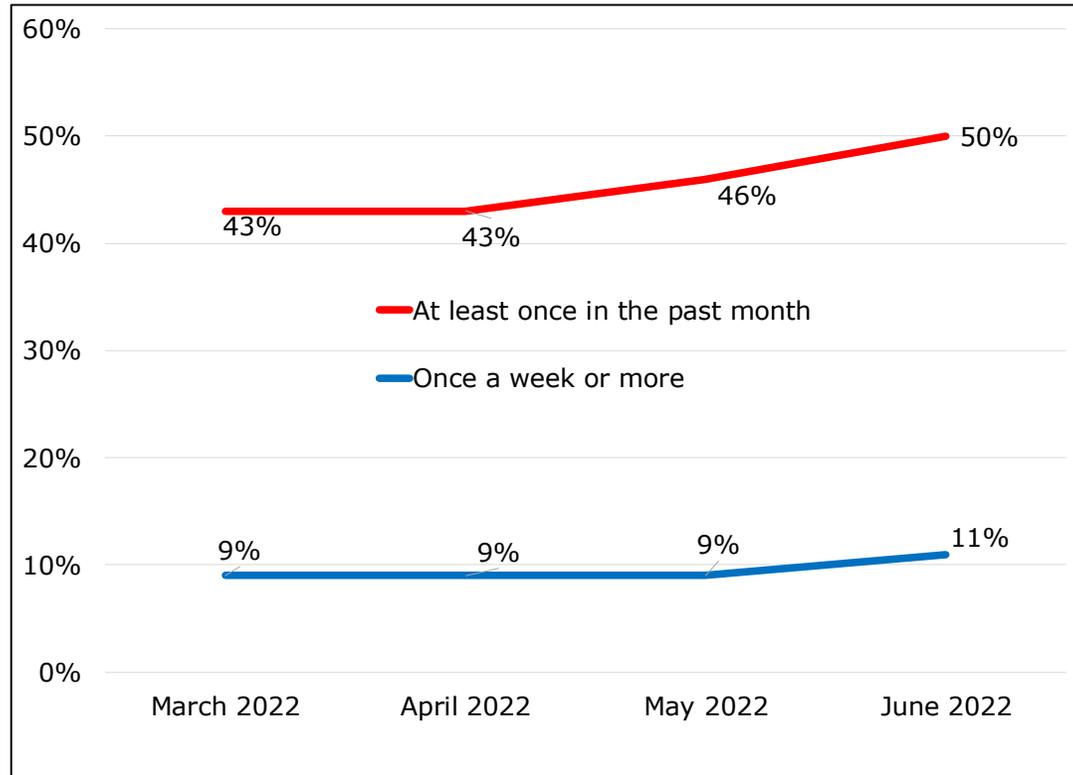
Restaurant Purchases Climb Higher in the GTA

- 52% of respondents in the GTA purchased dinner from a restaurant *once a week or more* in June – up 16 points compared to May, and the highest in the country. In contrast, this share declined sharply in Edmonton and Calgary following a robust May.



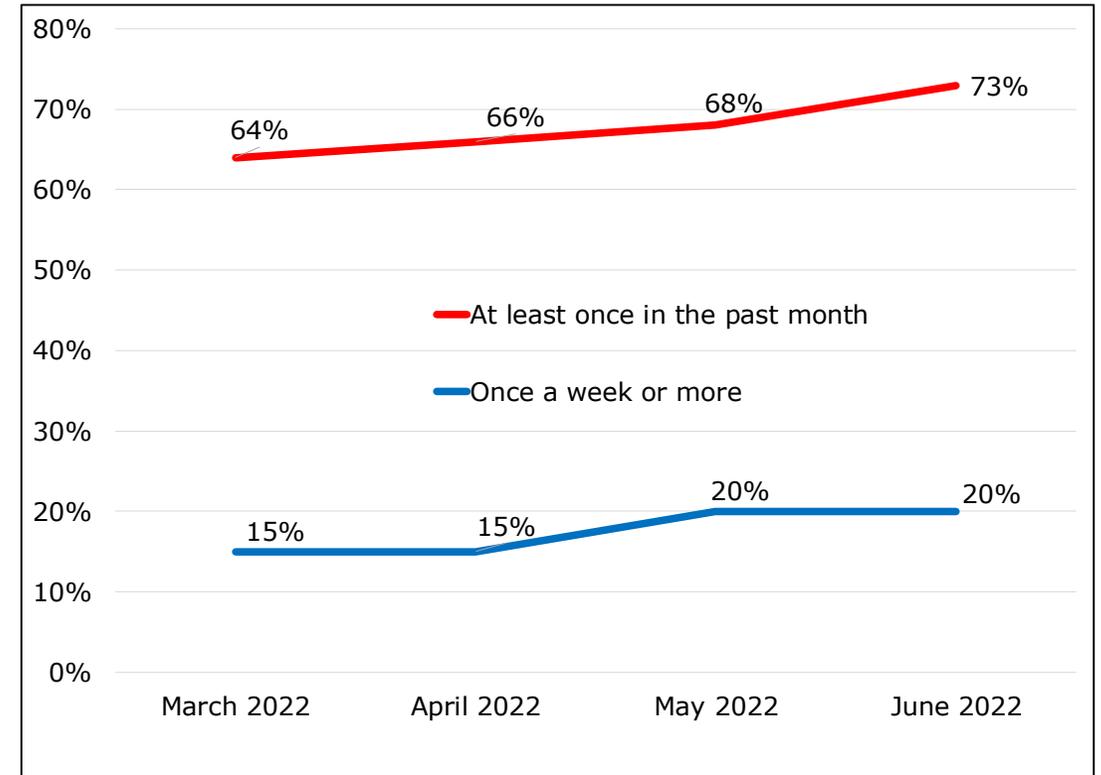
Share of Canadians who dined at, or ordered takeout or delivery, from a restaurant for the following dayparts.

Breakfast



- In June, half of Canadians ordered breakfast from a restaurant *at least once*, up from 46% in May. This was driven by an increase in the share of respondents in British Columbia and Alberta ordering breakfast from a restaurant one to three times a month.

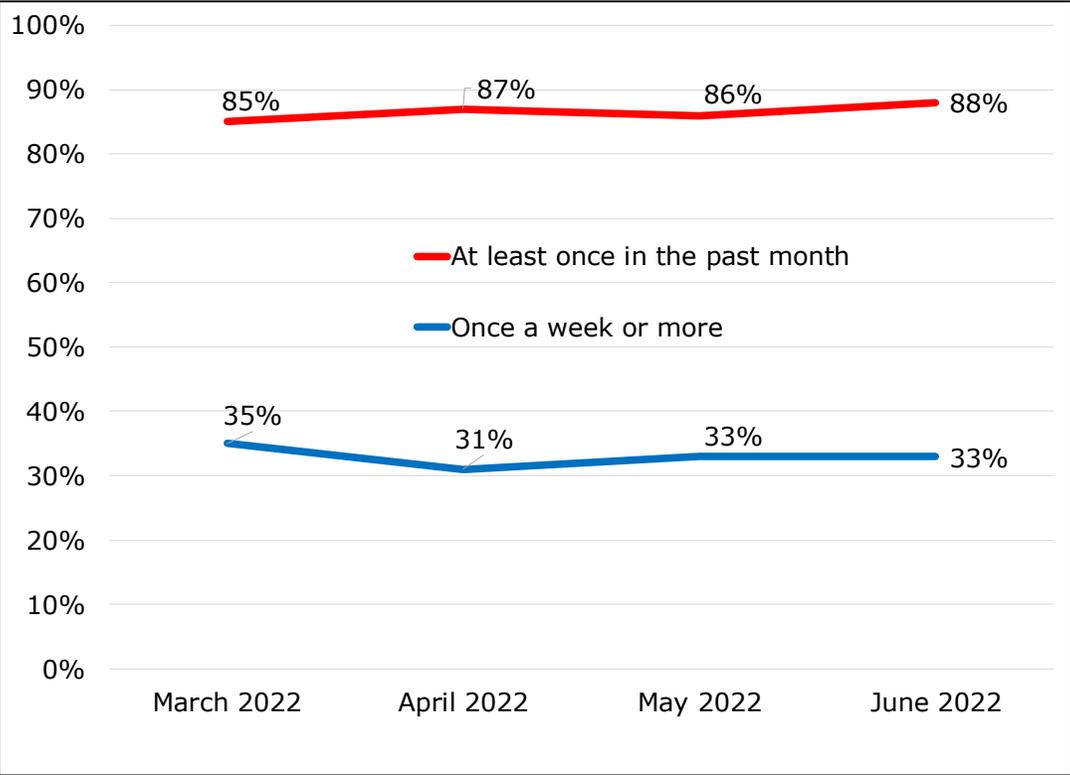
Lunch



- The share of Canadians who ordered lunch from a restaurant *at least once in the past month* jumped to 73% in June -- nearly 10 points higher than in March.
- The share of 35 to 54 year olds purchasing lunch from a restaurant *at least once* in June rose by 5 points compared to May, while the share of those 55 and older jumped by 10 points.

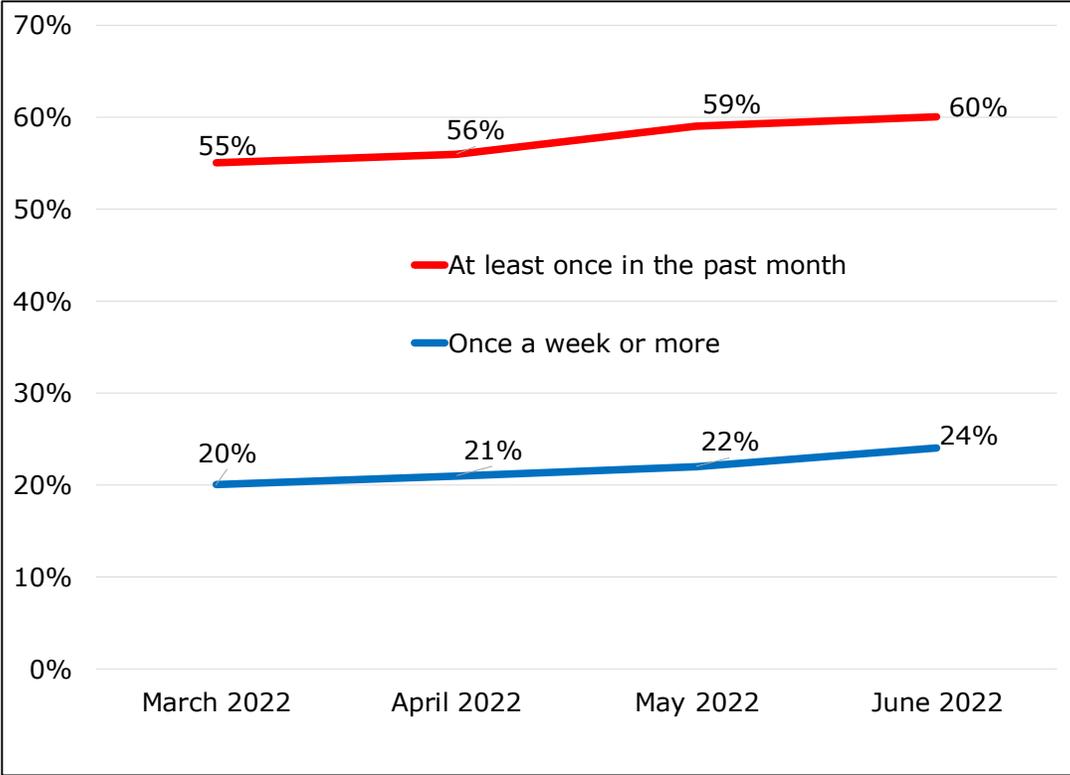
Share of Canadians who dined at, or ordered takeout or delivery, from a restaurant for the following dayparts.

Dinner



- The share of Canadians who purchased dinner from a restaurant *at least once a month* rose in June, as an increase in purchases in Ontario and Atlantic Canada offset fewer purchases by Albertans.

Coffee or Snack Break



- The share of Canadians who purchased a coffee or snack from a restaurant *once a week or more* rose for the third consecutive month to 24% in June.

Share of Canadians that dined at, or ordered takeout or delivery, from a restaurant *once a week or more* in June.

	TOTAL	Vancouver	Edmonton	Calgary	GTA	Ottawa	Montreal
Breakfast	11%	12%	7%	13%	21%	12%	9%
change over last month	2%	4%	-2%	3%	3%	5%	0%
Lunch	20%	28%	13%	21%	29%	18%	16%
	0%	12%	5%	-9%	7%	-2%	-6%
Dinner	33%	36%	32%	30%	52%	39%	29%
	0%	-2%	-11%	-23%	16%	5%	-10%
Coffee or snack break	24%	19%	18%	20%	36%	17%	20%
	2%	-11%	-3%	-11%	9%	-16%	1%

- Following a strong May, the share of respondents purchasing dinner from a restaurant *once a week or more* tumbled in June by 23 points in Calgary and 11 points in Edmonton. Since the start of the REACT survey in March 2022, there has been considerable volatility in Alberta, as a strong month has been followed by a weaker month.
- More than half of respondents in the GTA purchased dinner from a restaurant *once a week or more* in June, up 16 points compared to May.

Share of Canadians who expect to dine at, or order takeout or delivery, from the following foodservice establishments more often, less often or about the same compared to the previous month.

Quick-service Restaurant

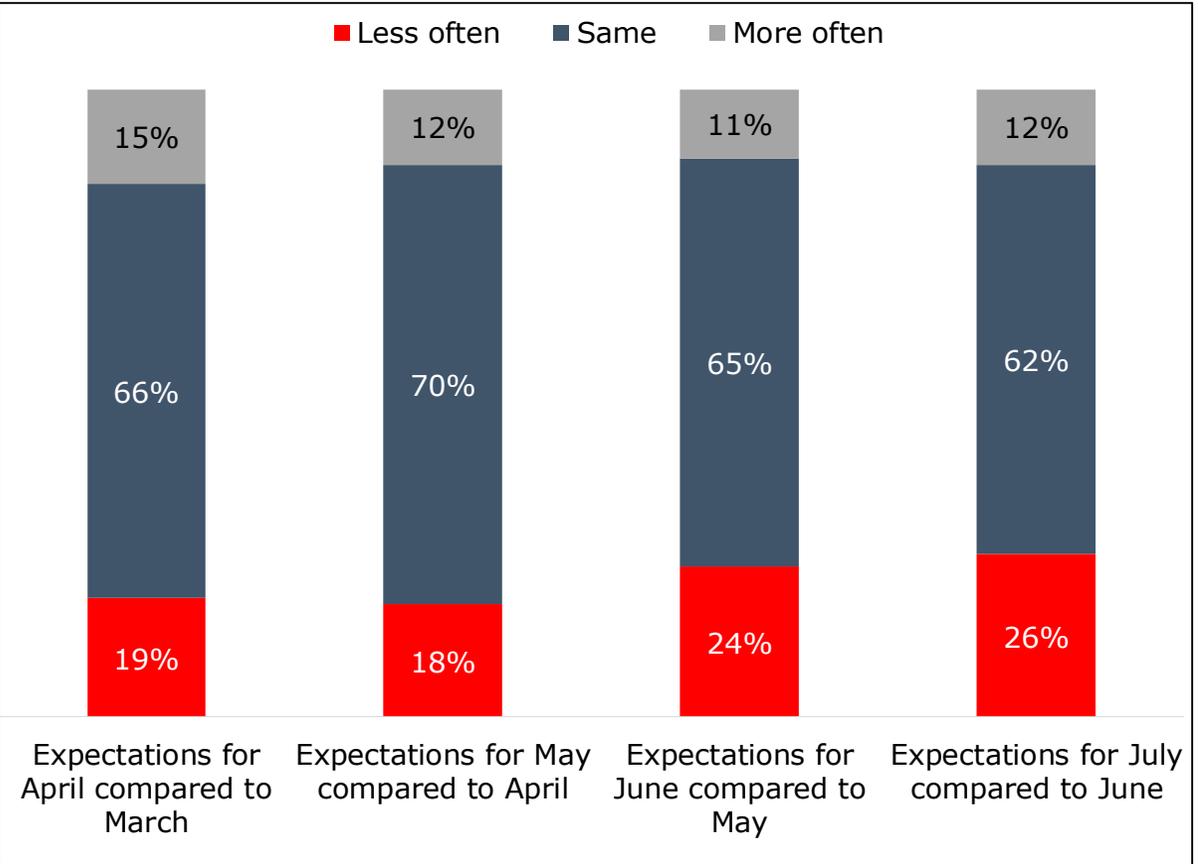
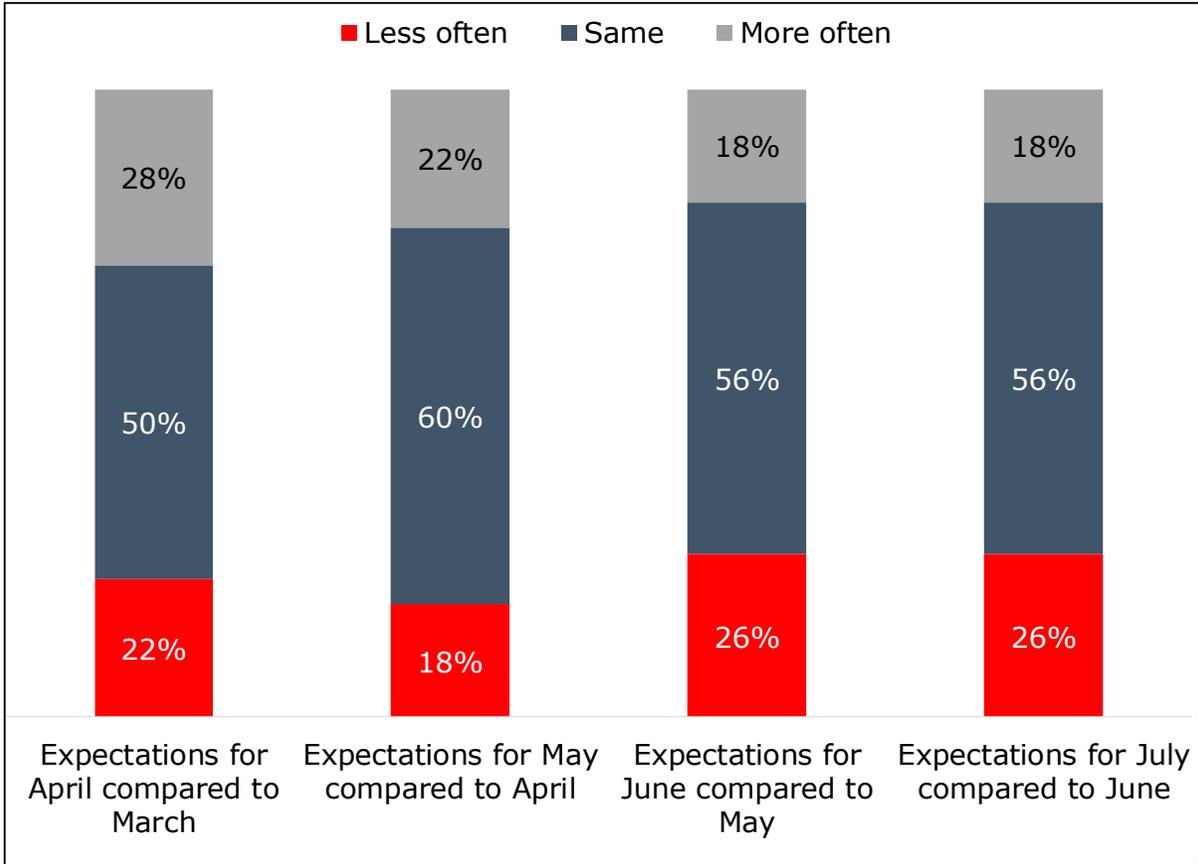


Table-service Restaurant



• There was little change in the share of Canadians who would order *more often* or *less often* from a restaurant in July compared to June. With the highest inflation rate in 40 years and growing concerns of a possible recession, roughly 1 in 4 Canadians said they will go out *less often* to a restaurant in July than in June.

TABLES

In June 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

BREAKFAST

	Total	18-34	35-54	55+
Never	50%	43%	48%	58%
<i>change over last month</i>	<i>-4%</i>	<i>-1%</i>	<i>-5%</i>	<i>-5%</i>
Once	21%	21%	23%	19%
	<i>1%</i>	<i>-2%</i>	<i>4%</i>	<i>2%</i>
2-3 times	18%	20%	18%	15%
	<i>1%</i>	<i>2%</i>	<i>-1%</i>	<i>2%</i>
4-5 times	6%	8%	7%	5%
	<i>0%</i>	<i>-1%</i>	<i>2%</i>	<i>0%</i>
6 and more times	5%	8%	4%	3%
	<i>2%</i>	<i>2%</i>	<i>0%</i>	<i>1%</i>

- As Canadians are becoming more comfortable going out, a greater share of 35 to 54 year olds, and those 55 and older, purchased breakfast from a restaurant *at least once* in June. Still, 18 to 34 year olds are much more likely to purchase breakfast from a restaurant *once a week or more* compared to other age cohorts.

LUNCH

	Total	18-34	35-54	55+
Never	27%	22%	24%	34%
	<i>-5%</i>	<i>1%</i>	<i>-5%</i>	<i>-10%</i>
Once	22%	22%	21%	23%
	<i>1%</i>	<i>3%</i>	<i>-1%</i>	<i>3%</i>
2-3 times	31%	30%	33%	28%
	<i>4%</i>	<i>-1%</i>	<i>4%</i>	<i>5%</i>
4-5 times	13%	15%	14%	10%
	<i>0%</i>	<i>-2%</i>	<i>1%</i>	<i>1%</i>
6 and more times	7%	11%	8%	5%
	<i>0%</i>	<i>-1%</i>	<i>1%</i>	<i>1%</i>

- In a similar trend to breakfast, a greater share of Canadians in the 35 to 54 year old and 55 and older categories purchased lunch from a restaurant *at least once* in June. However, the share of 18 to 34 year olds that purchased lunch from a restaurant *once a week or more* moderated in June compared to May.

In June 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

DINNER

	Total	18-34	35-54	55+
Never	12%	10%	8%	17%
<i>change over last month</i>	<i>-2%</i>	<i>1%</i>	<i>-1%</i>	<i>-5%</i>
Once	19%	16%	18%	23%
	<i>3%</i>	<i>4%</i>	<i>4%</i>	<i>3%</i>
2-3 times	36%	33%	37%	37%
	<i>-2%</i>	<i>-4%</i>	<i>-5%</i>	<i>1%</i>
4-5 times	23%	27%	25%	18%
	<i>1%</i>	<i>0%</i>	<i>1%</i>	<i>1%</i>
6 and more times	10%	14%	12%	5%
	<i>0%</i>	<i>-1%</i>	<i>1%</i>	<i>0%</i>

- In June, a greater share of Canadians 55 years and older purchased dinner from a restaurant *at least once* compared to May, while 18 to 34 year olds and 35 to 54 year olds made slightly fewer purchases.
- Nevertheless, 41% of 18 to 34 year olds purchased dinner from a restaurant *once a week or more* in June, compared to 37% of 35 to 54 year olds and 23% of those 55 and older.

COFFEE OR SNACK BREAK

	Total	18-34	35-54	55+
Never	40%	35%	36%	47%
	<i>-1%</i>	<i>7%</i>	<i>-4%</i>	<i>-6%</i>
Once	14%	13%	14%	14%
	<i>1%</i>	<i>-2%</i>	<i>1%</i>	<i>3%</i>
2-3 times	23%	24%	23%	22%
	<i>-1%</i>	<i>-4%</i>	<i>0%</i>	<i>1%</i>
4-5 times	11%	12%	12%	9%
	<i>0%</i>	<i>-3%</i>	<i>0%</i>	<i>2%</i>
6 and more times	12%	16%	15%	8%
	<i>1%</i>	<i>2%</i>	<i>3%</i>	<i>0%</i>

- The share of Canadians who purchased a snack from a restaurant *once a week or more* rose in June due to an increase in orders by 35 to 54 year olds and those 55 and older. In contrast, fewer 18 to 34 year olds purchased a snack from a restaurant in June following robust demand in May.

In June 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

BREAKFAST

	British Columbia	Alberta	Sask/MB	Ontario	Quebec	Atlantic
Never <i>change over last month</i>	44% -10%	52% -8%	58% 3%	50% 0%	50% -7%	57% -2%
Once	27% 4%	21% 7%	19% -1%	20% 0%	22% 2%	12% -6%
2-3 times	20% 7%	19% 1%	16% -5%	17% -1%	17% 1%	20% 6%
4-5 times	6% 0%	3% -2%	5% 2%	7% -1%	7% 2%	7% 2%
6 and more times	3% -1%	5% 2%	2% 1%	6% 2%	4% 2%	4% 0%

- Across most of the country, a greater share of respondents purchased breakfast *at least once* in June compared to May.

In June 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

LUNCH

	British Columbia	Alberta	Sask/MB	Ontario	Quebec	Atlantic
Never <i>change over last month</i>	20% -11%	30% -4%	28% -2%	27% -3%	32% -4%	22% -9%
Once	21% -5%	25% 5%	23% -1%	24% 3%	21% 2%	13% -5%
2-3 times	34% 9%	26% -1%	29% 6%	29% 0%	32% 7%	34% 2%
4-5 times	15% 3%	9% -3%	16% 1%	13% 0%	11% -1%	22% 10%
6 and more times	10% 4%	10% 3%	4% -4%	7% 0%	4% -4%	9% 2%

- Nearly six in 10 respondents in British Columbia purchased lunch from a restaurant *two times or more* in the month of June, up 16 points compared to May. Overall, 80% of British Columbians purchased lunch from a restaurant *at least once* in the month of June, the highest share of any province.

In June 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

DINNER

	British Columbia	Alberta	Sask/MB	Ontario	Quebec	Atlantic
Never	8%	16%	9%	9%	15%	15%
<i>change over last month</i>	-9%	7%	-6%	-1%	-2%	-4%
Once	18%	14%	24%	20%	19%	18%
	2%	5%	9%	3%	2%	4%
2-3 times	43%	39%	35%	32%	38%	34%
	6%	1%	-4%	-8%	5%	-10%
4-5 times	20%	20%	20%	26%	21%	22%
	-1%	-10%	-3%	4%	-1%	8%
6 and more times	11%	11%	12%	13%	7%	11%
	2%	-3%	4%	2%	-4%	2%

- Due to pent-up demand, the share of respondents who purchased dinner from a restaurant *once a week or more* rose by 6 points to 39% in Ontario, and jumped 10 points to 33% in Atlantic Canada. In contrast, the share of Albertans who *never* purchased dinner from a restaurant increased by 7 points in June following strong consumer demand in May.

In June 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

COFFEE OR SNACK BREAK

	British Columbia	Alberta	Sask/MB	Ontario	Quebec	Atlantic
Never <i>change over last month</i>	32% -11%	42% 2%	45% 6%	34% 0%	51% -1%	36% -9%
Once	20% 8%	10% 0%	12% -5%	14% 2%	12% -1%	12% -4%
2-3 times	28% 5%	30% 0%	22% -4%	21% -5%	19% 1%	25% 8%
4-5 times	10% -2%	9% -1%	14% 4%	13% 0%	8% 0%	11% 4%
6 and more times	10% 0%	9% -1%	7% -1%	18% 3%	10% 1%	16% 1%

- Ontario and Atlantic Canada have the highest share of respondents who purchased a snack from a restaurant *once a week or more* in June, 31% and 27% respectively. Once again, just over half (51%) of respondents in Quebec *never* purchased a snack from a restaurant in June.

Will you be dining at or ordering takeout or delivery from the following foodservice establishments more often, less often or about the same **in July compared to June?**

QUICK-SERVICE RESTAURANT

	Total	18-34	35-54	55+
A lot more often	2%	3%	2%	2%
<i>change over last month</i>	0%	0%	0%	1%
A little more often	9%	13%	6%	10%
	1%	3%	1%	0%
About the same amount	62%	57%	65%	64%
	-4%	-3%	-4%	-3%
A little less often	16%	18%	17%	14%
	1%	-1%	3%	2%
A lot less often	10%	9%	9%	11%
	1%	2%	-1%	2%

TABLE-SERVICE RESTAURANT

	Total	18-34	35-54	55+
A lot more often	3%	3%	2%	3%
	1%	0%	-1%	1%
A little more often	15%	15%	15%	15%
	0%	-2%	1%	-1%
About the same amount	57%	54%	59%	57%
	1%	3%	2%	-2%
A little less often	13%	16%	13%	11%
	-2%	-3%	-1%	-2%
A lot less often	12%	13%	11%	14%
	1%	3%	-2%	4%

- Due to growing economic uncertainty, there was a slight increase in the share of 18 to 34 year olds, and those 55 years and older, who intend to order *a lot less often* from a quick- or table-service restaurant in July.

Will you be dining at or ordering takeout or delivery from the following foodservice establishments more often, less often or about the same **in June compared to May?**

QUICK-SERVICE RESTAURANT

	British Columbia	Alberta	Sask/MB	Ontario	Quebec	Atlantic
<input type="checkbox"/> A lot more often <i>change over last month</i>	2% 0%	2% 1%	0% -2%	3% 0%	3% 2%	1% -5%
A little more often	8% -1%	6% -3%	5% -7%	11% 2%	9% 3%	12% 5%
About the same amount	66% -1%	66% -7%	62% -1%	64% -2%	55% -5%	65% -4%
A little less often	18% 4%	15% 4%	23% 7%	13% -2%	19% -1%	14% 8%
A lot less often	6% -2%	11% 5%	10% 4%	9% 2%	13% 0%	8% -4%

- One-third of respondents in Saskatchewan/Manitoba and Quebec said they expect to *order less often* from a quick-service restaurant in July.

Will you be dining at or ordering takeout or delivery from the following foodservice establishments more often, less often or about the same **in July compared to June?**

TABLE-SERVICE RESTAURANT

	British Columbia	Alberta	Sask/MB	Ontario	Quebec	Atlantic
□ A lot more often <i>change over last month</i>	3% 2%	2% 0%	0% -2%	3% -1%	3% 1%	1% -2%
A little more often	14% 3%	11% 0%	6% -8%	17% 0%	17% 0%	15% -2%
About the same amount	60% -5%	57% -7%	61% 8%	56% 1%	55% 5%	56% 4%
A little less often	15% -1%	18% 8%	17% -2%	11% -3%	13% -4%	16% -2%
A lot less often	8% 2%	13% 1%	16% 4%	13% 3%	13% -2%	12% 2%

- While most Canadians said they will make fewer purchases from a table-service restaurant in July, the share of respondents in British Columbia who expect to *order more often* rose by five points to 17%.

FOR FURTHER INFORMATION



**Restaurants
Canada**

The voice of foodservice | La voix des services alimentaires

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